The Vinyl Institute

Founded in 1982

Represents leading U.S. manufacturers of:

 Vinyl resin
 Vinyl chloride monomer
 Vinyl additives, and modifiers
DR. OZ VINYL POOL TOYS

Our rebuttal to Dr. Oz’s segment attacking PVC pool toys garnered 14,001 impressions and more than 300 engagements.

We also deployed Google search ads to capture any residual search traffic.

IMPRESSIONS | ENGAGEMENTS | ENGAGEMENT RATE
---|---|---
14,001 | 339 | 2.42%
Our response to National Geographic garnered 11,980 impressions and almost 1,000 engagements.

The 7.93% engagement rate is almost 4x the industry average rate of ~2%.
VINYL VERIFIED

GOOGLE – ads and organic placement

Our pushback against HBN’s anti-PVC reports ranks organically on the first page of search results for “Healthy Building PVC pipe.”

Our content is the #1 Google search result for “Topeka PVC” and is the #5 result for durability.”

Vinyl Verified also ranks on the first page relevant searches for vinyl content from National Geographic, and Dr. Oz.

Increase in traffic coming from Google in (39%) compared to 2018 (24%).
Our ads have been viewed more than 360,000 times and have garnered almost 10,000 engagements.

This represents a 611% increase in impressions and a 570% increase in engagements over the same time period in 2018.
Market Preferences & Use of Vinyl Building Materials

Prepared for:

The Vinyl Institute

May, 2019
Overall Audience Profile

- Facilities: 32%
- Interior Designers: 29%
- Architects: 39%

N=380

Job Function

- Architectural Design: 37%
- Interior Design: 35%
- Facility Management: 11%
- Project Management: 7%
- Other: 7%
- Construction Management: 2%
- Specification Writer: 2%
Overall Use of Vinyl Products

Overall Use of Vinyl Products (% of Respondents)

N=380

2019: 97%
2015: 96%
2010: 92%
2006: 96%
2003: 98%
Satisfaction with Vinyl Products

Overall Satisfaction with Vinyl
(1=Not at all Satisfied - Substantial Improvement Needed & 10=Completely Satisfied No Improvement Needed)

N=358

Overall: 2019 - 6.3, 2015 - 6.7
Architects: 2019 - 5.7, 2015 - 6.5
Interior Designers: 2019 - 6.3, 2015 - 6.3
Facilities: 2019 - 7.1, 2015 - 7.3
Change in Use PVC/Vinyl: Overall

Use of PVC/Vinyl 2019 to 2015
Overall (% of Respondents)

<table>
<thead>
<tr>
<th>Product Type</th>
<th>2019</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flooring</td>
<td>90%</td>
<td>86%</td>
</tr>
<tr>
<td>Furniture, upholstery, fabric &amp; films</td>
<td>73%</td>
<td>70%</td>
</tr>
<tr>
<td>Wall covering</td>
<td>72%</td>
<td>61%</td>
</tr>
<tr>
<td>Windows and doors</td>
<td>59%</td>
<td>65%</td>
</tr>
<tr>
<td>Fencing, decking and railing</td>
<td>48%</td>
<td>59%</td>
</tr>
<tr>
<td>Siding</td>
<td>45%</td>
<td>55%</td>
</tr>
<tr>
<td>Plumbing</td>
<td>43%</td>
<td>57%</td>
</tr>
<tr>
<td>Roofing</td>
<td>38%</td>
<td>57%</td>
</tr>
<tr>
<td>Electrical</td>
<td>34%</td>
<td>52%</td>
</tr>
</tbody>
</table>

N=380
Currently Use PVC/Vinyl

Currently Specify/Recommend/Purchase
Overall 2019

N=380
Frequency of Vinyl Use: 2019 to 2015

Average Percent of Projects Use Vinyl

Architects

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flooring</td>
<td>56%</td>
<td>59%</td>
</tr>
<tr>
<td>Plumbing</td>
<td>40%</td>
<td>43%</td>
</tr>
<tr>
<td>Windows and doors</td>
<td>39%</td>
<td>40%</td>
</tr>
<tr>
<td>Roofing</td>
<td>39%</td>
<td>42%</td>
</tr>
<tr>
<td>Wall covering</td>
<td>35%</td>
<td>36%</td>
</tr>
<tr>
<td>Siding</td>
<td>33%</td>
<td>33%</td>
</tr>
<tr>
<td>Furniture</td>
<td>32%</td>
<td>34%</td>
</tr>
<tr>
<td>Electrical</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>Fencing</td>
<td>28%</td>
<td>33%</td>
</tr>
</tbody>
</table>

N=137
Frequency of Vinyl Use: 2019 to 2015

Average Percent of Projects Use Vinyl

Interior Designers

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2015</th>
</tr>
</thead>
<tbody>
<tr>
<td>Flooring</td>
<td>69%</td>
<td>64%</td>
</tr>
<tr>
<td>Furniture</td>
<td>54%</td>
<td>61%</td>
</tr>
<tr>
<td>Wall covering</td>
<td>51%</td>
<td>51%</td>
</tr>
<tr>
<td>Windows and doors</td>
<td>34%</td>
<td>25%</td>
</tr>
<tr>
<td>Plumbing</td>
<td>19%</td>
<td>13%</td>
</tr>
<tr>
<td>Fencing</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>Siding</td>
<td>15%</td>
<td>11%</td>
</tr>
<tr>
<td>Roofing</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>Electrical</td>
<td>8%</td>
<td>8%</td>
</tr>
</tbody>
</table>

N=101
Frequency of Vinyl Use: 2019 to 2015

Average Percent of Projects Use Vinyl

Facilities

N=110
Satisfaction Vinyl Factors

Research conducted by:
Accountability Information Management, Inc. © 2019

Prepared for:
The Vinyl Institute
Perceptions/Use Research
Confidential and Proprietary

Satisfaction with Vinyl
2019 to 2015
Overall

- Easy to maintain/clean: 2019=7.7, 2015=7.7
- Meets client's needs: 2019=7.2, 2015=7.2
- Life cycle cost: 2019=6.9, 2015=7.2
- Use of recycled content: 2019=6.0, 2015=6.3
- Energy efficiency: 2019=5.8, 2015=6.5
- Health/safety considerations: 2019=5.6, 2015=6.3
- Sustainability: 2019=5.4, 2015=6.1
- Disposal/recyclability: 2019=5.3, 2015=6.0
- Effect on indoor air quality: 2019=5.3, 2015=5.9
- How product is manufactured: 2019=4.6, 2015=5.4
- Impact on the environment: 2019=5.5, 2015=5.5

N=358
Top Benefits of Vinyl

Top Benefits of Vinyl Building Materials
(% Respondents Top 5)
2019

N=379
Vinyl Environmental/Health Concerns

Concerns with Vinyl
(% of Respondents)

Concerns with Vinyl
2019
By Type Professional

N=358

N=358
### Vinyl Environmental/Health Concerns: Open-ended

<table>
<thead>
<tr>
<th>Environmental Concerns</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recyclability/Disposal</td>
<td>50%</td>
</tr>
<tr>
<td>Manufacturing Process</td>
<td>23%</td>
</tr>
<tr>
<td>Contains PVC/Haz. chemicals</td>
<td>16%</td>
</tr>
<tr>
<td>Not Green/Environmental</td>
<td>7%</td>
</tr>
<tr>
<td>Off-Gassing/VOC</td>
<td>7%</td>
</tr>
<tr>
<td>Uses Finite Resources</td>
<td>5%</td>
</tr>
</tbody>
</table>

N=167
Information Needs: PVC/Vinyl

Information Needed on PVC/Vinyl
(% Rank in Top 3)

N=354
Preferred Information Formats

Methods Used for Information
(% Rank in Top 3)

N=354
Top Organizations for Information

Top Organizations
By Type of Professional
(% of Respondents)

<table>
<thead>
<tr>
<th>Organization Type</th>
<th>Overall</th>
<th>Architects</th>
<th>Interior Designers</th>
<th>Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health/Safety Assoc. (i.e. NFPA, etc.)</td>
<td>69%</td>
<td>71%</td>
<td>76%</td>
<td></td>
</tr>
<tr>
<td>US Green Building Council (USGBC)</td>
<td>61%</td>
<td>64%</td>
<td>77%</td>
<td></td>
</tr>
<tr>
<td>Government Agencies</td>
<td>56%</td>
<td>60%</td>
<td>60%</td>
<td></td>
</tr>
<tr>
<td>National Trade Assoc. (AIA, IIDA, etc.)</td>
<td>44%</td>
<td>43%</td>
<td>47%</td>
<td></td>
</tr>
<tr>
<td>Environ. Organizations (i.e. NRDC)</td>
<td>41%</td>
<td>40%</td>
<td>53%</td>
<td></td>
</tr>
<tr>
<td>Independent Research Studies</td>
<td>37%</td>
<td>42%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>Product Manufacturers</td>
<td>32%</td>
<td>25%</td>
<td>26%</td>
<td>40%</td>
</tr>
</tbody>
</table>

N=354
THE VINYL INSTITUTE’S
2020–2023 STRATEGIC PLAN

Advocate
Engage
Steward
Innovate

Inform
Develop
Perform
States divided over banning plastic bags

Legislation dealing with other single-use plastics and foam on the rise as well

North Dakota, Oklahoma and Tennessee all passed state laws this year preventing their local governments from enacting bans or fees on containers and plastic packaging, including bags. These states are not the only ones debating plastic bans, and increasingly, states are including legislation dealing with issues beyond single-use plastic bags, by including straws and polystyrene foam. The National Caucus of Environmental Legislators say 34 states are considering over 200 pieces of legislation dealing with plastic pollution.

Washington state considered a statewide plastic bag ban in 2019 and passed in the state’s Senate. But the legislature adjourned April 26 without passing it for the year. It could be introduced in 2020. Vermont and Massachusetts are also deliberating over legislation restricting plastic bags and other packaging.

In Minnesota, there’s an effort to repeal the ban on bags that the state legislature passed in 2017.

Sources: American Progressive Bag Alliance, The Colorado Sun, National Caucus of Environmental Legislators, Plastics News graphic by Jessica Jordan
Vinyl Industry Congressional Fly-In
May 12-13, 2020
Washington, DC

Vinyl 360
November 10-12, 2020
Don CeSar Hotel
St. Petersburg, FL

@VinylinDesign
@Vinyl_Vfied